

ONBOARDING & ORIENTATION GUIDE



A complete onboarding experience promotes positive working relationships that help new employees gain confidence and promptly become productive. It increases overall engagement, retention, and performance through understanding of and connection to the job, the program or unit, and UC ANR. Onboarding is your first opportunity as a supervisor to set expectations and goals and introduce your new employees to the people and resources that will contribute to performing their jobs effectively and advancing their careers at UC ANR.

Employee Preferred Name _____

Pronouns (encouraged but not required) _____

Pre-Onboarding (Two weeks min. before start date)	Status	Completed By	Date
Review New Employee Safety Checklist and determine if background checks or finger printing need to be completed prior to employee starting.			
*Request an email through UCD IT , then notify UC ANR IT of email address needed and directory update needed; schedule with IT to meet with new hire on their first day. UCOP located employees request an email through the UCOP IT department.			
If located at the Davis ANR building, contact Building Services for new hire placement and space needs.			
Announce the new hire/start date to the team.			
Assign a colleague/academic peer (" buddy ") to help new hire acclimate to UC ANR.			
Email "Welcome Email" to new hire (cc's hiring team).			
Schedule meet & greet with team for employee's first day.			
Instruct new hire to bring in documents that establish identity/employment eligibility if I9 needs to be completed.			
Inform employee of COVID policy.			
*Add employee to collaborative tools .			
Request name plate/key fob from Facilities if Davis ANR building based.			
Discuss location specific parking/transportation options.			
Locate available UC ANR swag for new hire and prepare a welcome card signed by the team.			

*Note, do not perform this task until the new hire has been processed in UC Path.

Notify ANR building receptionist of new hire so a mailbox may be created. (Provide name, location, title and phone number). For UCOP based employees, contact Sonia Scott.			
Prepare a schedule for the new hire's first week.			
*Direct new hire to set up Duo multifactor authentication.			
First Day	Status	Completed By/Date	Date
Supervisor schedules time with new hire for most of the first day.			
Conduct a tour of the office building and introduce new hire to colleagues.			
Discuss office emergency plan and have new hire update their emergency contact information. Review Safety Checklist.			
*Complete I9 verification, W4 (use Glacier if not a permanent resident or U.S. citizen), & direct deposit.			
Share ANR holidays with employee and have them block these days off on their calendars.			
Review organizational chart.			
Sign up for ANR New Employee Administrative Orientation/Programmatic Orientation (Academic).			
Sign new hire documents: oath (U.S. Citizens only) , patent (UC Path online), CTO Agreement forms (for non-exempt academics and staff), statement concerning social security (students and limited hires only), position description, and employee work plan if applicable.			
Conduct a general overview of the ANR Portal.			
Identify and order any office supplies that may be needed.			
If on probationary period, confirm appropriate probationary review meetings with Supervisor.			
Connect new hire with their onboarding "buddy" or academic peer.			
For a meet and greet, take new employee to lunch, potluck with team, or coffee/tea.			
Follow-up with employee after they meet with IT to confirm they have proper access to work tools and platforms. This includes ensuring access to VPN.			
New hire completes alarm orientation with Facilities if based out of Davis ANR building.			

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Instruct on proper use of office equipment: copier, printer, scanner, laminator, phone system, etc.			
Offer ID badge for applicable employee locations.			
First Week	Status	Completed By	Date
Onboarding “buddy” or peer supplies reference list of helpful ANR contacts and website URLs for ANR employee support services.			
Bring CE Advisors and Specialists in to headquarters to meet with unit representatives/leaders.			
Check in with new hire to see how they are acclimating and to address any general questions.			
Show employee how to access and enter their hours into the Time Reporting System .			
For ANR Building employees, review office procedures: mail, kitchen facilities, how to reserve meeting rooms, and cover strict breakroom rules.			
View Tips on: Connecting , Networking & Mentoring .			
View the ANR Cooperative Extension 100 Years Video .			
Visit UC ANR Learning and Development , The Knowledge Bank , & the New Employee Guide .			
Discuss typical team communications, workflow storage, sharing, and processes.			
Share employee benefits and retirement information, resources, deadlines, and encourage participation in a UCPath Benefits Webinar .			
Discuss guidelines for work and leave time.			
Discuss work schedule and how to request changes.			
Complete and submit the flexible work agreement .			
If required, direct employee to complete purchasing card training , P-card request and review procedures for submitting P-card transactions.			
Connect employee with information on the corporate travel Visa card if applicable.			
Review the applicable department website.			
Learn about UC ANR Principles of Community .			

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First Month	Status	Completed By/Date	Date
Attend New Employee Welcome and sign up for New Employee Programmatic and Administrative Orientations .			
Complete required UC trainings as outlined in HR letter.			
Academics to log into Project Board to complete FTE Reporting. Watch this 8-minute training video . Additional information and instructions can be found on the New Hire Project Boards User Manuel . Begin to outline your key clientele groups for your UCCE program(s), as appropriate.			
If a Mandated Reporter, employment is subject to the requirements and compliance of the California's Child Abuse and Neglect Reporting Act (CANRA). CANRA updates and acknowledgement form are available at ANR's CANRA website.			
Ensure new hire, if eligible, enrolls in UC benefits within 31 days of hire date & choose retirement plan option.			
Explore UC ANR's website .			
Review ANR's Office of Diversity and Inclusion website .			
If an employee of the Davis ANR Building, consider getting a UC Davis employee identification card (AggieCard).			
Introduce Staff/Academic Assembly: what they do, related benefits, how to get involved or contact local staff assembly representative.			
If travel is expected as part of the employee's position duties and they need to use county or University vehicles, review the ANR vehicles policies and procedures.			
For relevant employees, complete DMV Pull Notice.			
Review Travel/Entertainment expense procedures .			
Order Business Cards .			
Three Months	Status	Completed By	Date
Supervisor to check in with new hire regularly.			
New employee continues to meet with "buddy" or academic peer.			
Ensure employee knows where to locate the UC ANR style checklist/complete style guide , color scheme, and other materials for branding.			

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If on probation, submit Probationary Period Mid-Point Evaluation to Staff HR.			
Supervisor to discuss action items for Mid-Evaluation with employee.			
Six Months	Status	Completed By	Date
Supervisor continues to check in with new employee.			
For applicable staff, submit Probationary Period Final Evaluation to Staff HR.			
Connect on annual evaluation process and timing: expectations, goals development, and workplans.			
For academics: outline a needs assessment and discuss it with your direct supervisor. Establish Goals/Objectives. See Annual Evaluation (AE) criteria and Merit & Promotion information. Review the criteria for advancement associated with your title in the E-Book .			
Introduce strategic initiatives, program teams, and workgroups.			

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